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Belgium-Luxembourg

Fishery Products

The Belgian Seafood Market

2001

Approved by:

Philip A. Letarte

U.S. Embassy

Prepared by:

Yvan Polet

Report Highlights:

Included are 1999 data on Belgian fish catches, seafood consumption, distribution and trade figures, as well as latest developments in this sector.

Includes PSD changes: No
Includes Trade Matrix: No
Unscheduled Report
The Hague [NL], BE

Belgian Fisheries

In 1999 the Belgian fishing fleet caught over 18,000 tons for a value of about US\$560 million compared to over 32,000 metric tons in 1990. This decline is due to EU fishing quota restrictions and also to the fact that the Belgian fleet is old and boats are too small to reach fishing grounds further away. Some boats have also been bought by Dutch fishermen who bring the Belgian fish quota in The Netherlands.

The major species from the 1999 catch were:

-sole	3,351 MT
-plaice	4,901 MT
-cod	2,278 MT
-ray	1,251 MT
-flounder	729 MT
-whiting	531 MT
-haddock	318 MT
-turbot	228 MT
-monkfish	206 MT
-shrimps	590 MT
-crayfish	293 MT

Source: Union of Flemish Fish Auctions

Belgian/Luxembourg Seafood Trade

Table 1:

Sea fish in MT	1995	1996	1997	1998	1999*
fishing	17,972	18,316	17,682	16,803	16,483
+import	114,292	118,454	112,377	134,642	116,336
-export	26,252	37,118	30,924	47,579	40,142
market	106,012	99,652	99,135	103,866	92,677

Freshwater fish in MT	1995	1996	1997	1998	1999*
fishing	1,500	1,500	1,500	1,500	1,500
+import	20,975	21,040	46,629	56,046	36,292
-export	4,730	5,391	22,029	27,539	12,110
market	17,745	17,149	26,100	30,007	25,682

Total fish in MT	1995	1996	1997	1998	1999*
fishing	19,472	19,816	19,182	18,303	17,983
+import	135,267	139,494	159,006	190,688	152,628
-export	30,982	42,509	52,953	75,118	52,252
market	123,757	116,801	125,235	133,873	118,359

* 1999 figures for Belgium only

Source: Belgian Ministry of Agriculture - Agricultural Statistics 1999

Belgian Seafood Consumption

In 1999, the average Belgian household spent about US\$3,825 on food including drinks and tobacco (some US\$3,000 on food only), representing 15.8% of total household expenses, compared to 16.4% in 1998, 16.8% in 1997 and 17.5% in 1996.

The regional distribution of food expenses per household for 1999 is summarized in Table 2.

Table 2:

Expenses in US\$	Belgium	Brussels	Flanders	Wallonia
Total Food	2,946	2,623	2,998	2,963
Meat	682			
Poultry	166			
Seafood:	174	167	185	156
-fresh seafood	100	106	104	93
-frozen	24	22	26	20
-canned	15	16	13	17
-smoked or dried	14	13	14	14
-convenience	21	11	28	12

Source: Visaktua No. 1, 2001

Belgian seafood consumption rose by 50% in June 1999 due to the dioxin crisis.

The impact of this food crisis faded by September 1999. The total impact of the dioxin crisis was a 6.8% increase in seafood consumption in 1999, from 7.80 to 8.33 kilos per person. As prices went up as well, expenditures increased by 14%. This boost in purchases resulted only in increased shellfish sales, while the market for fish decreased.

Table 3:

Market shares	% volume		% value	
	1998	1999	1998	1999
Sea fish	44.1	37.3	52.6	45.1
Freshwater fish	13.9	15.5	18.9	21.8
Shellfish	42.0	47.2	28.5	33.0

Source: Visaktua No. 3, 2000

Belgian Distribution

Seafood distribution goes through different channels: fish retail shops, market vendors and the different types of supermarkets among which the large ones are predominant.

Table 4:

Distribution % in volume	Total Market		Sea fish		Freshwater fish		Shellfish	
	1998	1999	1998	1999	1998	1999	1998	1999
Large supermarkets	46.9	50.7	36.8	41.4	54.1	56.5	55.2	56.2
Medium supermarkets	14.5	18.0	9.2	12.3	17.1	21.7	19.3	21.3
Small supermarkets	0.9	0.3	0.9	0.3	0.6	0.1	1.1	0.4
Market vendors	15.7	11.5	23.7	18.7	12.0	8.8	8.4	6.8
Fish retail shops	16.2	15.9	21.3	21.8	9.5	10.4	13.1	13.1
Other	5.8	3.6	8.1	5.5	6.7	2.5	2.9	2.2

Distribution % in value	Total Market		Sea fish		Freshwater fish		Shellfish	
	1998	1999	1998	1999	1998	1999	1998	1999
Large supermarkets	44.3	47.5	37.1	40.2	52.1	54.8	52.4	52.5
Medium supermarkets	13.9	16.8	8.8	10.3	17.3	22.5	21.2	22.1
Small supermarkets	0.8	0.3	0.8	0.2	0.6	0.2	0.9	0.4
Market vendors	17.0	13.0	23.4	19.3	12.4	8.6	8.1	7.3
Fish retail shops	17.4	18.4	21.4	24.0	11.1	11.8	14.3	15.2
Other	6.6	4.0	8.5	6.0	6.5	2.1	3.1	2.5

Source: Visaktua No. 3, 2000